CaRT Tip Sheet

How to Identify Returning or New Students

14 April 2017

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Returning Students

If you need a term-based report on returning students you’ll have to identify them with the aid of a sub-analysis. This is necessary because there isn’t a flag or indicator to identify returning students. And though it may seem counterintuitive, the first thing you need to do is identify new students.

Oracle's business intelligence documentation uses the term “analysis” to refer to the group of objects (title, analysis, filters, etc.) that comprise a report or query. In this document analysis, report, and query all refer to the same thing—a request to the data warehouse for information.

Identify New Students

The analysis that identifies new students will be used as a filter in our primary analysis—the one that identifies returning students. As such, it only needs to retrieve EMPLID. Let’s start by selecting the STUDENT RECORDS–STUDENT ENROLLMENT STATISTICS subject area. This area is selected because it contains begin terms for both academic program and institution.

The filter is composed of two parts (see Figure 1). The first is created by setting ACADEMIC PROGRAM BEGIN TERM CODE equal to ACADEMIC INSTITUTION BEGIN TERM CODE.

We use the “code” version of the begin and end terms because coded values help our queries run faster. In fact, the use of codes is usually best practice in any filter.

The rationale behind our filter is that a student who begins attending the institution (UC) during the 2178 term, for example, and whose program begin term is the same as the institution begin term, is a new student. The filter’s second part (the syntax following the AND connector) is slightly more complicated. But all it’s doing is capturing the term for which we want to run the report.
In the lower half of the filter we are naming the variable that will store the actual term code of interest and assigning an optional default value (e.g., 2178). The default is useful only for retrieving viewable data when building or editing our analysis. The name of the variable can be anything we want it to be; here, we are calling it “enRollTerm.”
The steps for creating the lower half of the filter are shown beginning with Figure 2. The first step is to filter on ACADEMIC PROGRAM BEGIN TERM, then select “Add More Options” and choose “Presentation Variable.”
In the variable expression data-entry box, type your variable name (e.g., “enRollTerm”) and, below that, an optional default term value.

FIGURE 3

The enrollment term variable which we’ve created here will be populated by the term selected in the primary analysis which we’ll create next. But, first, we’ll save this query as “a_SR-StudEnrollStats_New Students.”

Identify Returning Students

Now we’ll create the primary analysis and its filter for returning students (Figure 4). We’ll be using the STUDENT RECORDS–TERM ENROLLMENTS subject area because it has enrollment by term and enrollment status. For this report, we only want returning students who’ve actually enrolled.
The first filter we apply is ENROLLMENT STATUS CODE equals “E” (enrolled). The second filter is on EMPLID and this is where we access the first query we just created.

FIGURE 4
To exclude new students from our list of enrolled students, we need to filter on EMPLID. Select “Filter” and then change the operator from “is equal to / is in” to “is based on results of another analysis” (Figure 5).

FIGURE 5
Next, click on “Browse” and navigate to where the new-student analysis was saved (Figure 6).

**FIGURE 6**
Once the new-student analysis has been located and selected, change the relation
ship for EMPLID as shown in Figure 7.

FIGURE 7

Change relationship from “is equal to any” to “is not equal to any.”
**Prompts**

We’re almost done. But we need to create a report prompt to capture the term, which we can change when running the report.

**FIGURE 8**

![Prompts interface](image1)

After clicking on the “Prompts” tab, click on the green plus sign to add a report prompt.

**FIGURE 9**

![Prompts interface](image2)

Select “Column Prompt” then “More Columns.”
After we’ve selected the term-code column for our prompt, we set the default value to the current term (CURRENT_TERM_CODE) and we store that value to a presentation variable named "enRollTerm." This is also the variable name we created in our first analysis.

When we run the report, the term value, whether the default or another of our choosing, is also passed to the first analysis. Thus, both new and returning students will be filtered on the same term.
Summary

This CaRT Tip Sheet explains how to create an analysis to identify returning students. With one minor change to the filter shown in Figure 7 (that is, set the relationship to “is equal to any”), the same analysis can be used to identify brand new students!